

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT TUITION REFUND PLAN	Number 70.30	Issue 8	Page 1 of 5
	Effective Date July 1, 1991		

1. PURPOSE

- 1.1 To encourage and financially assist employees to continue their education so as to improve job knowledge, skills and capabilities on their present job and to prepare for advancement within City employment.
- 1.2 To assist the City, through employee development, in achieving maximum use of human resources in attaining departmental objectives including Equal Employment Opportunity goals.

2. POLICY

- 2.1 Eligible employees will be reimbursed for 100% of tuition and mandatory fees, and for textbooks and supplies under certain conditions, up to a limit of \$700.00 per fiscal year. Reimbursement will be made for professional and technical courses offered by accredited colleges, universities, business, trade or correspondence schools, as part of an educational plan which has been approved by the Appointing Authority.
 - a. Taxation of reimbursements will be made based on Internal Revenue Service (IRS) regulations.
 - b. The Auditor and Comptroller will be responsible for determining which reimbursements are taxable income in accordance with IRS regulations.
- 2.2 Tuition Reimbursement is a negotiated employee benefit, whereas attendance at trainings is available at management's discretion. Tuition Reimbursement will not be available for related employee travel expenses. Tuition Reimbursement course attendance must occur on the employee's personal time, not on City time. Travel costs are potentially reimbursable when related to attendance at trainings. Training may be attended on City time.

(Supersedes Administrative Regulation 70.30, Issue 6, dated July 1, 1979)

Authorized

(Signed by Ed Ryan)

AUDITOR & COMPTROLLER

(Signed by John W. Witt)

CITY ATTORNEY

(Signed by Charles G. Abdelnour)

CITY CLERK

(Signed by Judith Bauer)

LEGISLATIVE SERVICES
DIRECTOR

(Signed by Rich Snapper)

PERSONNEL DIRECTOR

(Signed by Severo Esquivel)

PLANNING DIRECTOR

(Signed by Jack McGrory)

CITY MANAGER

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT TUITION REFUND PLAN	Number 70.30	Issue 8	Page 2 of 5
	Effective Date July 1, 1991		

- 2.3 One day seminars are considered training and are ineligible for Tuition Reimbursement. A semester or quarter course can be paid for by Tuition Reimbursement.
- 2.4 Conditions under which reimbursement may be approved are as follows:
- a. The course work must relate to the applicant's present position or must be beneficial to the employee's City related professional development, or must enhance career advancement potential within the City of San Diego, as follows:
- (1) An improvement in skills or knowledge required by the present position;
 - (2) Preparing the employee for significant technological changes occurring in his/her City related career field;
 - (3) Preparing the employee for changes in duties due to the different use of a position or class;
 - (4) Preparing the employee for the assumption of new and different duties as a result of a recent promotional appointment;
 - (5) Preparing the employee for promotional opportunities within the employee's present career series with the City, supported by a logical educational plan of accomplishment approved by the Appointing Authority; or
 - (6) Preparing the employee for career-enhancing promotional opportunities or transfer opportunities into a different City career series.
- b. An educational plan must be approved by the Appointing Authority prior to course enrollment. This plan must include:
- (1) Intended degree to be achieved or continuing professional education requirements to be satisfied;
 - (2) Major area of study;
 - (3) Core courses and number of electives required by the educational institutions; and

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT TUITION REFUND PLAN	Number 70.30	Issue 8	Page 3 of 5
	Effective Date July 1, 1991		

(4) Additional information as required by the Appointing Authority.

- c. Reimbursement will be made for all core courses and for electives taken to fulfill degree requirements. Core courses should take priority, and the majority of them should be completed prior to enrolling in elective courses.
- d. Reimbursement will be made for courses taken to satisfy professional continuing education certificate and/or licensing requirements. These courses must directly relate to the employee's City career.
- e. Individual semester or quarter classes directly related to the employees current position with the City are potentially reimbursable.
- f. Requests for reimbursement must approved by the Appointing Authority before enrollment in the course.
- g. Reimbursement will be made for tuition fees and/or required textbooks and a reasonable amount of supplies (as determined by the Appointing Authority) verified by receipts upon completion of the course with a grade of at least "C", "Satisfactory", "Pass" (for Pass/Fail courses), or the equivalent.
- h. The employee must have completed six months of City service in a budgeted City position prior to starting the course. Tuition reimbursement is not available for hourly employees.
- i. The minimum amount of tuition reimbursement which will be approved for any employee is \$5 per course.
- j. The employee must not be receiving funds for the same course from any other source, such as Veteran's benefits, scholarships, etc.
- k. Tuition fees for City sponsored courses for which academic credit is granted by an accredited college or university shall be reimbursable under this program, subject to the limits described above.

3. REQUESTS AND REIMBURSEMENT - PROCEDURE

- 3.1 Employee meeting the eligibility rules fills out Form CM-1578, "Request for Approval of Tuition Reimbursement", with 4 copies, attached, prior to enrollment in the class. The form is available from departmental payroll clerks. A central supply is maintained in City Operations Building - Store No. 4.

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT TUITION REFUND PLAN	Number 70.30	Issue 8	Page 4 of 5
	Effective Date July 1, 1991		

- 3.2 The completed form is presented to the employee's Appointing Authority or designated representative for signature.
- 3.3 Upon approval, the original is forwarded to the Financial Management Department - Organization Effectiveness Program (MS-8A) for statistical analysis. Three copies are retained by the employee's payroll clerk.
- 3.4 Upon completing the course, the employee will furnish the departmental payroll clerk with receipts of payments made and evidence of satisfactory completion.
- 3.5 The departmental payroll clerk will then process a "Request for Director Payment" (Form AC-468) to provide for reimbursement to the employee. Original receipts, proof of passing grades, approved education plan and two copies of form CM-1578 must be attached.
- a. The Auditor's Department will enclose the employee's copy of form CM-1578 with the employee's tuition reimbursement check.
- 3.6 Taxable tuition reimbursements will be reflected on the employee's biweekly payroll Statement of Earnings and at calendar year-end on the employee's W-2.

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT TUITION REFUND PLAN	Number 70.30	Issue 8	Page 5 of 5
	Effective Date July 1, 1991		

APPENDIX

Subject Index

Personnel - Tuition Refund
Reimbursement - Tuition Refund
Training - Eligibility, Tuition Refund
Tuition Refund - Approval, Eligibility, Reimbursement

Reference List

Administrative Regulation 70.40, Special Outside Courses of Instruction.

Forms Used

PEA-1523 (Rev. 9/78) "Request for Approval of Tuition Reimbursement".